



EDUCATIONAL VISITS AND TRIPS POLICY

THIS POLICY APPLIES TO THE HEARTWOOD LEARNING TRUST BOARD, THE CENTRAL TEAM,
AND ALL TRUST SCHOOLS/ACADEMIES

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Policy Updates

Date	Page	Policy Updates
June 2023	Whole policy	New Policy
October 2024	4	Responsibilities of the LGC removed
October 2024	8	4.5 - Wording amended to reflect inclusive arrangements
October 2024	27	Appendix - Minimum Staff to Pupil Ratios clarified for all schools/academies within the Trust
October 2024	15	18.2 - Authorising body amended
November 2024	9	7.2 - Further clarification to reflect inclusive arrangements
July 2025	3	Introduction added in line with other Trust policies
July 2025	4	1 - Legal Framework updated
July 2025	6	3.6 - Point added regarding recommended training
July 2025	8	5.4 - Point added regarding information on local area visits
July 2025	9	8 - Transport updated to reflect current Trust policies
July 2025	26	Appendix 5 - Local Procedures updated to reflect local area visits

Introduction

Heartwood Learning Trust is an inclusive and collaborative Church of England multi-academy trust serving church, community and alternative provision schools. This policy is guided by our Christian ethos and the visions of our Trust and its schools/academies. We share a clear vision – to create schools where children and young people thrive, as we help them prepare to live life in all its fullness (John 10:10).

For us, a place to thrive means much more than a place simply to be comfortable. Instead, our aim is to develop schools and an educational offer which enable each pupil to flourish academically, practically, emotionally, socially and spiritually.

Statement of Intent

Heartwood Learning Trust (HLT) understands that visits and trips can be an effective way of motivating pupils, and can often offer unique opportunities and educational experiences. The Trust aims to ensure pupils are engaged in their learning and that they are provided with plenty of opportunities to explore this more in a practical setting. The Trust believes that educational visits can enhance pupils' development, raise achievement and help to improve the overall school/academy performance and ethos. The Trust will ensure that all pupils are offered the opportunity to attend any educational visit/trip no matter their age, ability or circumstances.

The health and wellbeing of our staff and pupils is of utmost importance and the Trust prioritises this when organising off-site activities such as school trips. The Trust aims to establish a safe and welcoming learning environment during educational visits. This policy has been designed alongside the DfE and HSE guidance to meet all applicable legislation and to detail the responsibilities of pupils, staff and any other parties whilst they participate in educational visits/school trips off site.

1. Legal Framework

1.1 This policy has due regard to all relevant **legislation** and **statutory guidance** including, but not limited to, the following:

- HSE - School trips and outdoor learning activities (2011)
- DfE - Health and safety on educational visits (2018)
- DfE - 'Health and safety: advice on legal duties and powers' (2014)
- DfE - Keeping Children Safe in Education (2025)
- DfE - Charging for school activities (2018)
- The Health and Safety at Work etc. Act (1974)
- DfE - Driving school minibuses (2013)
- The Equality Act (2010)

1.2 This policy operates in conjunction with the following **Trust** policies:

- Safeguarding and Child Protection Policy
- Health and Safety Policy & Procedures Manual
- First Aid Policy
- Transport Policy
- Data Protection (UK GDPR) Policy
- Equality Policy and Objectives
- Complaints Policy and Procedure
- Behaviour Policy
- Marketing and Communications Policy
- Charges and Remissions Policy

2. Definitions

2.1 '**In loco parentis**' means that the group leader of any school trip or educational visit has a duty of care over the pupils in place of a parent/carer.

2.2 '**School trip**' means any educational visit, foreign exchange trip, away-day or residential holiday organised by the school/academy which takes pupils and staff members off-site.

2.3 '**Residential**' means any school trip which includes an overnight stay.

2.4 Activities of a '**High Risk**' include, but are not limited to, the following:

- Trekking
- Caving
- Skiing
- Water sports
- Rock climbing

2.5 '**Overseas**' means any educational visit outside of the UK mainland

3. Roles and Responsibilities

3.1 The **Chief Executive Officer (CEO)** is responsible for:

- Approving any overseas or High Risk educational visits and trips in principle, as recommended by the **Principal** and **Trust Operations Manager (TOM)**

3.2 The **Chief Operating Officer (COO)** is responsible for:

- In conjunction with the **CEO**, approving any overseas or High Risk educational visits and trips in principle, as recommended by the **Principal** and **TOM**
- Ensuring that this policy complies with the **Equality Act 2010**
- Providing advice and guidance to the **Principal** in the event of an emergency or serious accident/injury regarding next steps and contact with the next of kin (NOK) of any involved persons
- Providing advice and guidance to the **Principal** (or other designated senior leader) regarding any press release/media communications following an emergency or serious accident/injury in conjunction with Trust policies

3.3 The **Trust Operations Manager (TOM)** is responsible for:

- Oversight of all educational visits and trips in each school/academy
- Reviewing and seeking approval in principle from the **COO** and **CEO** for any overseas or High Risk educational visits and trips
- Oversight of planning information listed on the Trust's nominated Educational Visits and Trip platform (**EVOLVE**) for any overseas or High Risk educational visits and trips

3.4 The **Principal** is responsible for:

- Ensuring that the provision of educational visits and trips positively impacts on pupils' lives, teaching them life skills and providing them with new experiences
- The day-to-day implementation of this policy
- Nominating an **Educational Visits Coordinator (EVC)** for the purposes of organising educational visits for the school/academy
- Liaising with the **Designated Trip Leader** to communicate any planned school trips to parents/carers
- Approving school trips and activities in principle for Low - Medium Risk
- Submitting a request for approval via the **TOM** for any **High Risk or overseas trips** in advance of parental/carers engagement
- Review the trip/visit is inclusive and, where possible, accommodates all pupils and their needs.
- Seeking recommendations from the **TOM** for any High Risk educational visits or overseas trips
- Approval of fully planned and costed trips on **EVOLVE**
- Costings are inline with Trust budgets/policy
- Ensuring that the **EVC** is sufficiently trained and competent to oversee the coordination of off-site educational activities
- Ensuring suitable safety measures are in place following appropriate risk assessments being carried out in advance of any school trip or activity
- Ensuring that all volunteers have undergone the relevant safeguarding checks in advance of the trip departing.
- Overseeing the work of the **EVC**, ensuring a whole school/academy approach is adopted when planning and coordinating school trips to promote inclusion and equal opportunity for all pupils
- Ensuring that there are robust contingency plans in place in the event of a member of staff being unable to attend work on the day of the trip or activity
- Being the first point of contact in the event of an emergency or serious accident/injury and liaising with the **COO** to seek advice and guidance on next steps

- Consulting with the **COO** or **CEO**, in their absence, regarding any media communications following an emergency or serious accident/injury

3.5 The nominated **Educational Visits Coordinator (EVC)** is responsible for:

- Oversight of issues and implementing contingency plans regarding school trips and activities
- Partaking in any additional training required to act as an **EVC** for the school/academy
- Completing refresher Health and Safety training to ensure they remain up to date with relevant guidance
- Liaising with the **Designated Trip Leader** for each school trip
- Overseeing the planning of educational visits and trips, ensuring that all relevant risk assessments have been completed by the **Designated Trip Leader**
- Ensuring that the **Designated Trip Leader** receives any additional training as required for the additional duties
- Ensuring that the **Designated Trip Leader** has completed the **Financial Planning Form** documented in [Appendix 3](#) within an appropriate time frame prior to the educational visit or trip that they are responsible for

3.6 The **Designated Trip Leader(s)** will be responsible for:

- Exercising their duty of care to all pupils on the school trip as in loco parentis
- Identifying the educational purpose of the extracurricular trip or activity and presenting its benefits to the **Principal**
- Undertaking any relevant* training or courses which are arranged by the **EVC** (**it is highly recommended that trip leaders complete the 'Visit Leader Theory' course ran by the North Yorkshire Education Service (NYES)*)
- Ensuring that staff have undertaken the correct accreditation to lead on the Bronze Duke of Edinburgh Award visits
- Liaising with the **Designated Safeguarding Lead (DSL)** whilst planning any educational visit/trip to ensure all safeguarding risks have been taken into account and minimised, where possible
- Seeking approval in principle from the **Principal** for all educational visits and trips
- Once approved inline with this policy any overseas or High Risk educational visits and trips should be discussed with the **TOM** to ensure compliance. The **TOM** reserves the right to escalate concerns or recommendation of cancellation to the **COO** or **CEO**, in their absence, should a risk be identified.
- Ensure that the trip/visit is inclusive to all pupils.
- Completing all essential documentation for the trip and ensuring it has been approved in principle by the **Principal**
- Conducting a risk assessment prior to school trips and educational visits to ensure pupil and staff safety
- Ensuring that staff ratios meet the minimum standard and take into account, where applicable, individual pupils needs
- Creating an itinerary prior to an educational visit or school trip and distributing it to pupils, parents/carers and staff to ensure the day is well organised and safe
- Ensuring all paperwork and planning details are uploaded onto **EVOLVE** for approval by the appropriate body
- Informing parents/carers (in conjunction with the **Principal**) of the proposed extracurricular trip or activity in a timely manner and distributing permission slips to parents/carers, where appropriate
- Implementing safeguarding measures throughout the planning, organisation and delivery of the extra-curricular trip or activity

- Ensuring all adults on the trip are aware of their responsibilities and that the necessary checks have been carried out on volunteers in line with the Trust's **Safeguarding and Child Protection Policy**
- Completing appropriate financial planning for the school trip(s) that they have responsibility for, as per the requirements listed in [Appendix 3](#), and delegating tasks to school/academy administrative staff where appropriate.
 - When in the financial planning stages, the Designated lead is to contact the **Finance Officer** for their school to ensure financial viability for the trip.
- Reading the appropriate guidance: HSE - 'School trips and outdoor learning activities (2011)' and DfE - 'Health and safety on educational visits (2018)'
- Ensuring that all hardcopy documentation utilised for the trip is signed out, kept safe during the trip and signed back in upon return. This includes reporting any data breach(es) which may occur during the trip
- Contacting the **Principal** in the first instance to report any emergency or serious accident/injury; in the event that they are unobtainable, escalating this to the **TOM**

3.7 The **Designated Safeguarding Lead (DSL)** is responsible for:

- Liaising with the **Designated Trip Leader** to identify any safeguarding concerns during the planning of any educational visit/trip

3.8 The **SENDCo** is responsible for:

- Liaising with pupils' parents/carers, where appropriate, to consider what reasonable adjustments may be necessary

3.9 The **Chief Finance Officer (CFO)** is responsible for:

- Using their discretion, in conjunction with the **COO** to determine whether a refund should be given to parents/carers in the event that the trip is cancelled due to unforeseeable circumstances.
- Considering appeals or alternative options in the event that a pupil cancels their place on a trip, where the parent/carer will be liable for the costs incurred and non-refundable deposit paid.

3.10 Members of **Administrative Staff** are responsible for:

- Completing financial planning tasks as directed by the **Designated Trip Leader**. Further details of responsibilities can be found within [Appendix 3](#)
- Signing hardcopy documentation out on departure of the trip and back in upon return. To ensure that all returned documentation is either confidentially disposed of or retained in line with the Trust's **Data Protection (UK GDPR) Policy** and accompanying **Data Retention Schedule**.

3.11 Members of **staff** are responsible for:

- Adhering to this policy and applying its principles when participating in extracurricular trips and off-site activities
- Ensuring they are competent and comfortable with their delegated responsibilities, undertaking training where necessary
- Ensuring the safety of the pupils is maximised throughout any educational visit or activity
- Ensuring that any data breaches are reported to the **Designated Trip Leader** immediately
- Not permitted to take family members on any Trust/school/academy trips or off-site activity detailed within this policy.

3.12 **Volunteers** participating in the school trip are responsible for:

- Adhering to this policy and applying its principles when participating in extracurricular trips and activities

- Undertaking the required level of safeguarding checks in advance of the trip.
- Supervising and ensuring the safety of pupils by following the procedures outlined by the **Designated Trip Leader**

3.13 **Pupils** are responsible for:

- Behaving appropriately during educational visits and trips, inline with the Trust's **Behaviour Policy**
- Not taking unnecessary risks
- Following the instructions of the **Designated Trip Leader** and other adults present
- Dressing sensibly and responsibly for weather conditions and the local environment

4. Planning School Trips, Visits and Academy Off Site Activities (inc fixtures/events)

4.1 Prior to planning a school trip, the following guidance will be read by the **Designated Trip Leader**:

- HSE - [School trips and outdoor learning activities \(2011\)](#)
- DfE - [Health and safety on educational visits \(2018\)](#)

4.2 Planning must be undertaken utilising the Trust's approved cloud based system (Evolve) to facilitate effective planning, management, approval and evaluation of all activities covered within this policy. No exception will be permitted.

4.3 A thorough risk assessment will be conducted by the **Designated Trip Leader** during the planning of the trip, to ensure pupil and staff safety.

4.4 When partaking in adventure trips, activities will always be identified at the planning stage and never added during the trip. When planning water sport activities, the need for instructors and lifeguards will be taken into account, particularly when using facilities which may not have a trained lifeguard present.

4.5 The school/academy will do everything in its power to ensure that all pupils are given an opportunity to participate in school trips, for example, organising two trips with a smaller group size or finding a venue which can cater for all pupils and is completely accessible. Where there is a maximum capacity of pupils for a trip, places will be allocated on a first come, first served basis.* This will be clearly communicated to parents/carers.

In certain circumstances (such as oversubscribed residentials or overseas trips), the **COO or CEO, in their absence, may permit an alternative selection method such as a ballot to promote fairness and inclusivity for all pupils.*

4.6 When planning an educational trip or activity, the **Principal** will ensure the trip does not discriminate against a particular individual, or group of pupils. School trips will be agreed upon by the **TOM** before any formal plans have been implemented. Each pupil will have an equal opportunity to participate in a pre-planned trip or activity.

4.7 Any disputes relating to pre-planned educational trips or activities will be discussed and resolved by the **Principal**.

5. Risk Assessment Process

- 5.1 Our risk assessment process is designed to manage risks when planning trips, while ensuring that learning opportunities are experienced to the fullest extent. The individual carrying out the risk assessment process will have the skills, status and competence needed for the role, understand the risks involved, and be familiar with the activity.
- 5.2 The process is as follows:
- Identify the hazards
 - Decide who might be harmed and how this could occur
 - Evaluate the risks to pupils, volunteers (where applicable) and staff members, and then decide on precautions and control measures required to minimise the risks
 - Record findings and implement them
 - Review assessment and update if necessary
- 5.3 A risk assessment must be conducted for each school/academy trip before it is undertaken to identify hazards and control measures specific to the trip.

Local Area Visits

- 5.4 The Trust recognises that risks are minimal for educational visits and trips within the local learning area. The school/academy utilises their local learning area to access a variety of learning activities on a regular basis, such as local libraries, museums, parks etc. Educational visits and trips in the local learning area are subject to Standard Operating Procedures, which assists with planning the trips. Further details of the school/academy's local learning area can be found within [Appendix 5](#).

6. Vetting Providers

- 6.1 When considering external providers for activities, the **EVC** will check whether they hold the '[Learning Outside the Classroom Quality Badge](#)' to indicate they meet nationally recognised standards.
- 6.2 If a provider does not hold the badge, the **EVC** will check the following to ensure they are a suitable organisation to work with:
- Their insurance arrangements
 - Their adherence to legal requirements
 - Their control measures
 - Their use of vehicles
 - Staff competency levels
 - Safeguarding policies
 - The suitability of their accommodation
 - Any sub-contracting arrangements in place
 - The presence of necessary licences
- 6.3 If it is deemed appropriate to engage with an external provider, a written agreement will be created outlining what each party is responsible for. If an organisation does not meet the school/academy's standards, they will not be considered.

7. Equal Opportunities

- 7.1 The school/academy promotes values of equality and does not discriminate against any individual or group of pupils when organising a trip. The extra-curricular trips and activities offered to pupils will

provide new experiences and develop life skills. Extra-curricular trips and activities are organised, managed and conducted in accordance with the Trust's **Equality Policy and Objectives**.

- 7.2 Due to the popularity of some extra-curricular trips and activities, the school/academy offers places on either a first come, first served basis or via another method, approved in advance by either the **COO** or **TOM**, for example a ballot. The selection method will be made clear to stakeholders at the point of invitation to apply, join or express their interest in the trip and/or activity.
- 7.3 Where possible, pupils will be given the opportunity to contribute to the planning and organisation of extra-curricular trips and activities.
- 7.4 For school trips that require additional payment, the fee will be reasonable and help will be provided where possible for pupils who cannot afford to pay this fee.

8. Transport

Please note: The following is applicable only to schools/academies who are in possession of a Trust owned/leased vehicle for school/academy use.

- 8.1 The **Principal**, or where applicable, the **Support Services Manager (SSM)** or designated individual is responsible for arranging the annual maintenance of any Trust owned/leased vehicles in their possession, including MOTs and PSVs. The Trust arranges annual insurance and road tax. The use of these vehicles will be organised in accordance with the Trust's **Transport Policy**.
- 8.2 Any drivers responsible for driving a school/academy owned vehicle must:
 - Complete MIDAS (Minibus Driver Awareness Scheme) training
 - Be aged 21 or over
 - Have at least two years' experience as a qualified driver
 - Hold a valid full driving licence with no more than 3 penalty points*

In exceptional circumstances, cases will be reviewed on an individual basis by the **TOM in line with the respective insurance policy and approved by the **COO**.*

- 8.3 Internal damage to a school/academy owned vehicle is the responsibility of the individuals using the vehicle. The school/academy will decide who is responsible for covering the cost of any repairs. The vehicle will carry strictly one person per seat and seat belts must be worn at all times. Fines incurred will be paid by whoever was driving the vehicle at the time the offence was committed.
- 8.4 Start and finish mileage, along with any potential risks, defects or damage identified, will be reported upon return to the school/academy. Please refer to [Appendix 5](#) for localised procedures, including details of staff members who hold the required licence and have completed specific training which allows them to drive the school/academy minibus.

9. Parent/Carer Consent

- 9.1 Parental consent is sought on an annual basis at the beginning of each academic year, and otherwise during enrollment for any pupils transferring mid-year. This only covers off-site activities that take place during school hours as these usually form part of the expected curriculum. However, where vulnerable children are expected to participate in any off-site activity, further discussions or consent may be sought

from the parents/carers to ensure there are no additional risks for the child(ren) to be taken to any specific venue.

- 9.2 Parental consent is required for all trips and visits that sit outside those stated within 9.1 including those defined as low to medium risk.
- 9.3 Additional specific written consent is required for:
- Activities of an 'adventurous' nature
 - Residential trips
 - Overseas trips
 - Trips expected to occur outside of normal school hours
 - Any other educational visit/trip determined as High Risk
- 9.4 Parents/carers will be informed of activities via letter and will have the opportunity to withdraw their child from taking part if they do not deem an educational visit to be appropriate for their child.

10. Staffing Ratios

- 10.1 The school/academy will ensure that there are sufficient members of suitable staff available on a school trip to safely and effectively manage an emergency situation. Consideration must be given to factors such as gender, age, ability, medical conditions and other related elements of the pupils.
- 10.2 The school/academy will ensure there are sufficiently trained staff available to supervise pupils on a school trip and to offer suitable wellbeing advice and guidance when required.
- 10.3 With the exception of early years settings, whose staff to pupil ratios are outlined on pages 28 to 30 of the [Statutory framework for the EYFS](#), there is currently no statutory guidance on staff to pupil ratios in secondary schools/academies, both on and off the school/academy premises.

Union advice, however, tends to offer a general recommendation and DfE advice can enable schools/academies to make an informed decision.

- 10.4 The DfE's [Health and safety: advice on legal duties and powers](#) 2014, however, states: ***"Schools need to consider their duties under health and safety law when planning trips abroad."***

The DfE document also makes reference to the HSE's frequently asked questions on school trips, which says: "Pupil to staff ratios for school trips are not prescribed in law. Those planning trips, on the basis of risk assessment, should decide the ratios, taking into account the activity to be undertaken and the age and maturity of the pupils."

- 10.5 The [NSPCC](#) provides guidance on recommended staffing ratios for working with children, including outside of the school environment. When working with groups of children and young people there must be a sufficient number of adults to provide the appropriate level of supervision.
- 10.6 The NSPCC has provided best practice guidance to help schools/academies to work out how many adults are needed to supervise pupils safely. It is recommended to have at least two adults present when working with or supervising children and young people.

- 10.7 The suggested '**starting points**' for considering staffing ratios, e.g. for visits to local historical sites, museums and local walks are as follows:
- One adult for every six pupils in years 1 to 3
 - One adult for every eight pupils in years 4 to 6
 - One adult for every ten-fifteen pupils in year 7 onwards

These must be considered as **minimum ratios only.*

11. Insurance and Licensing

- 11.1 When planning activities of an adventurous nature in the UK, the **EVC** will check that the provider of the activity holds a current licence. Insurance will be organised for every trip, no matter how short, to ensure adequate protection and medical cover is in place. Parents/carers will be informed of the limits of any insurance cover.
- 11.2 Where a crime is committed against a member of the party, it will be reported to the **COO** (or **TOM** in their absence) and local police as soon as possible.
- 11.3 Medical expenses will be recorded and stored in the school/academy main office.

12. Accidents and Incidents

- 12.1 In the case of accidents and injuries while on a school trip in the UK, the school/academy's accident reporting process will begin, as detailed in the Trust's **Health and Safety Policy & Procedures Manual**.
- 12.2 In the case of accidents and injuries while on a school trip abroad:
- Organisers will cooperate fully with local emergency services and understand that any injury or death of a member of staff or pupil outside of the UK may be subject to the law of the land where the accident occurred
 - The first point of contact within the UK will be the **Principal** who will seek advice from the **COO** (or **CEO** in their absence) before making contact with the NOK of the injured person
 - Pupils will be asked not to contact friends or parents in the UK until the NOK of the injured person can be contacted
 - The British Embassy/Consulate will be informed
 - The insurer will be notified
- 12.3 The **Principal** will keep written records of any incidents, accidents and near misses as per the Trust's **Data Retention Schedule** ([Appendix 1](#) within the **Data Protection (UK GDPR) Policy**).
- 12.4 Media enquiries will be referred to the **Principal** or, if they are not available, the **Vice Principal** or the most senior member of staff available who will seek advice from the **COO** before speaking to the press.
- 12.5 Staff will be briefed on how to react and respond should an emergency situation occur. Relevant risk assessments will be undertaken before the trip, including for points of interests such as museums and hotels. Pupils and staff are informed of an evacuation plan before entering trip venues; this should include an agreed rendezvous point, to ensure everyone knows what to do in an emergency.
- 12.6 To ensure pupils are easily identifiable, they must wear their uniform. Where school trips are of an 'adventurous nature', uniforms may not be appropriate for the intended activity. In this case, pupils will be given a ribbon/flag/badge or other token to enable staff members and pupils to be able to easily identify them. Similarly, where school trips are scheduled to last longer than one day, pupils will not be

expected to wear a full uniform for the duration of the trip. Please refer to [Appendix 5](#) for further information on appropriate dress code for pupils on school trips.

13. Missing Person Procedure

- 13.1 The school/academy places pupil and staff safety as its highest priority when participating in school trips, either domestically or abroad.
- 13.2 Before embarking on a school trip, extensive risk assessments are undertaken in accordance with this policy. The **EVC** and **Designated Trip Leader** will liaise with the venues of the school trip(s) to ensure the correct group sizes are planned for each setting.
- 13.3 When travelling with pupils with SEND, the **EVC** will ensure an appropriate adult accompanies them at all times and that the visit is adequately modified to suit the pupils' needs in accordance with Trust policies.
- 13.4 Everyone on the trip will be provided with a contact sheet for all members of staff, in the event they are unable to locate their group. All staff members and pupils will be required to carry mobile phones with them at all times. If a pupil doesn't own a mobile phone, they will be paired up with a pupil who has a mobile phone.
- 13.5 Upon arriving at every venue, the **Designated Trip Leader** will identify a rendezvous point where pupils and adults should go if they become separated from the rest of the group. Pupils and staff will wear school/academy branded clothing, or another appropriate identifier in order to make them easily identifiable. Please refer to [Appendix 5](#) for further information regarding dress code.
- 13.6 Regular head counts of all pupils and staff will take place throughout the day to ensure all persons are present at all times.
- 13.7 In the event that an individual becomes separated from the group whilst partaking in a school trip:
 - The **Designated Trip Leader** will ensure the safety of the remaining pupils and staff by taking a register to identify who is missing.
 - The **Designated Trip Leader** will immediately identify at least one adult to start looking for the missing individual and another adult to contact them via telephone; these people will look for the person until, where necessary, the police arrive.
 - Where possible, the venue will be notified of the missing person to help ensure the individual is found quickly.
 - If the person cannot be contacted or located within 10 minutes, the local police or relevant authorities, e.g. the British Embassy, will be contacted.
 - If the police are called, the **Designated Trip Leader** will contact the **Principal**, or other available person, back at the school/academy and inform them of what has happened.
- 13.8 If the police, or another authority, is called to an incident where someone is missing, they will oversee locating the person and will advise on factors including, but not limited to, when to contact the missing person's NOK.
- 13.9 If the missing person cannot be found, the group will return to the school/academy. If this is not possible, e.g. when a trip is taking place abroad, the **EVC** will make arrangements to ensure the group's safety, e.g. by changing venues or cancelling visits.
- 13.10 If a member of the party has gone missing and is subsequently found, the **Designated Trip Leader** will:

- Review the group sizes and staffing ratios to ensure no one becomes separated from their group.
- Review whether more registers should be conducted throughout the day.
- Assess which venues they attend to ensure they are suitable for the group.
- Make recommendations to the **EVC** to ensure similar incidents can be avoided in the future.

14. Pupils with SEND

- 14.1 Where possible, activities and visits will be adapted to enable pupils with SEND to take part. The **SENDCo** will liaise with the pupils' parents/carers, where appropriate, to consider what reasonable adjustments may be necessary.
- 14.2 Where this is not possible, an alternative activity of equal educational value will be arranged for all pupils. Pupils with SEND will be accompanied by a responsible adult during the extra-curricular trip or visit.

15. Finance

- 15.1 The financial procedures outlined in the Trust's **Charges and Remissions Policy** will always be followed when arranging trips.
- 15.2 Please refer to [Appendix 3](#) for further information regarding deadlines for trip organisers to submit financial requests during the trip planning phase.
- 15.3 The school/academy will act in accordance with the DfE's guidance document 'Charges for school activities' (2018) and, therefore, will only charge for trips which are classed as an 'optional extra'. This is education provided outside of school time which is not:
- Part of the national curriculum.
 - Part of a syllabus for an examination that the pupil is being prepared for at the school/academy.
 - Part of religious education.
- 15.4 Money for school trips will always be paid directly to the school/academy. Under no circumstances should school trip money be processed through personal accounts.
- 15.5 All letters to parents/carers regarding school trips will include a clause explaining what will happen in the event that the trip is cancelled or a pupil cancels their place on the trip.
- 15.6 In the event that the trip is cancelled due to unforeseeable circumstances, it is at the **COO** and/or **Chief Finance Officer (CFO)** discretion as to whether a refund is given to parents/carers.
- 15.7 In the event that a pupil cancels their place on a trip, the parent/carer will be liable for the costs incurred and non-refundable deposit paid. In special circumstances, the **COO** and/or **CFO** may consider an appeal or alternative options such as whether deferring their place should the trip take place frequently or offering a place to another pupil on a future trip. Where a pupil has previously cancelled a space on a school trip and received a full/partial refund, the school/academy reserves the right to refuse to allow the pupil to attend future trips and visits.
- 15.8 The Trust will take a common-sense approach to refunds and cancellations, ensuring that all pupils are treated equally. Any charge made in respect of pupils will not exceed the actual cost of providing the trip divided equally by the number of pupils participating.

- 15.9 Once trip arrangements are booked and confirmed, if contributions to a trip exceed the total cost of the trip, a refund will be given where the excess is greater than £5 per pupil.

16. Trips Abroad

- 16.1 When planning school trips abroad, the school/academy will consider the Foreign and Commonwealth Office's guidance 'Safer adventure travel and volunteering overseas' (2015) and, where an activity poses significant risks, the school/academy will also consult the British Standard for adventurous activities outside the UK.
- 16.2 Validity of passports, visa requirements and other entry requirements, e.g. vaccination status, will be researched and dealt with within **three months** of the initial notification of the trip, to avoid problems when the trip is due to take place.
- 16.3 Staff and pupils will be taught about the culture and values of the country they are visiting, to ensure they understand and respect the values of the citizens.
- 16.4 At least **three months** before the trip is due to commence, the **EVC** will check the travel advice for each country the trip will visit to ensure no visa or permit is needed and to check any other regulations or time limitations.
- 16.5 Staff and pupils will be made aware that they must not have spent over 90 days in the EU, Switzerland, Norway, Iceland or Liechtenstein, within a 180-day period if they intend to participate in any trips within these countries.
- 16.6 Before the trip, the relevant healthcare and travel insurance checks will be conducted to ensure attendees are covered for medical issues or accidents.
- 16.7 Pupils and staff will be informed if they need to apply for a free **Global Health Insurance Card (GHIC)** or **European Health Insurance Card (EHIC)** to ensure they can access state-provided healthcare during a temporary stay in the EU.
- 16.8 Before the trip, staff are trained in spotting suspicious behaviour and remaining vigilant whilst abroad.
- 16.9 Before the trip, pupils will be taught how to remain vigilant in the country they are visiting, particularly about advances from strangers.
- 16.10 Registers will be taken at the start and end of each day, as well as before, during, and after events, and at regular intervals whilst on days out to ensure the whereabouts of pupils are known at all times.
- 16.11 Staff will check the location's local news at the start of each day of the trip, to ensure their planned activities are safe to go ahead. A minimum of two members of staff attending the trip will have at least an intermediate understanding of the destination country's language.
- 16.12 At the start of the trip, all pupils and staff are provided with an emergency contact sheet, this includes the **Designated Trip Leader's** mobile phone number, as well as emergency numbers and phrases for the country they are visiting.

- 16.13 When using external providers abroad, the school/academy will check whether the provider holds an equivalent of the 'Learning Outside the Classroom Quality Badge'. If no such equivalent can be ascertained, the school/academy will make checks prior to agreeing to use the provider.

17. Evaluating Visits and Trips

- 17.1 Following an educational trip and/or visit, the **EVC** will meet with any staff members present on the trip to assess the success of the trip in respect of both educational value and safeguarding effectiveness.
- 17.2 Based on this assessment, recommendations will be made to improve future trips and visits.

18. Monitoring and Review

- 18.1 The approver of this policy and the next scheduled review date is shown on the cover page of this document.

Appendix 1 - Educational Visits Annual Consent Form

Educational Visits Annual Consent Form

Please sign and date the form below if you are happy to give consent for the child for whom you have responsibility for to participate in Educational Visits/School Trips:

Name of Pupil:		Year Group/Class:	
☐ I understand that by signing this form I am agreeing that I give my permission for my child, named above, to take part in school trips and other activities that take place outside the school/academy premises. ☐ I understand that by signing this form I give permission for my child, named above, to receive first aid or urgent medical treatment during any school trip or activity if necessary.			
Please note the following important information before signing this form			
The trips and activities covered by this consent include: - All Low-Medium Risk local educational visits and trips within normal school-hours - Low-Medium Risk 'adventure' activities at any time - Off-site sporting fixtures outside the school/academy day - All off-site activities for Early Years Foundation Stage pupils			
- The school/academy will send you information about each trip or activity before it takes place - You can, if you wish, tell the school/academy that you do not want your child to take part in any particular school trip or activity - Written parental consent will not be requested from you for off-site activities offered by the school/academy that form part of the curriculum and take place during school hours			
Please complete the medical information section below (if applicable) and sign and date this form.			
Details of any medical condition that my child suffers from and any medication my child should take during off-site visits:			
Name of Parent/Carer:		Signature of Parent/Carer:	
Date:			

Appendix 2 - Parental Consent form for Specific Educational Visit(s)

Parental Consent form for Specific Educational Visit(s)

Please complete and sign the below form if you are happy to give consent for the child for whom you have responsibility to participate in this specific school trip.

Pupil Details		Visit Details	
Name		Date	
Year Group/Class		Time	
Date of Birth (DOB)		Destination details	
Home Telephone Number			
Mobile Telephone Number			
Family Doctor (GP)		Means of transport	
Doctor's Tel. Number			
Doctor's Address			
Please detail below if your child suffers, even mildly, from any medical condition such as epilepsy, asthma, diabetes, heart condition, allergies, bed wetting or physical weakness. Also, if your child has suffered from any contagious or infectious diseases during the past three months, please detail these. All information will be treated in confidence.			
When did your child last have a tetanus injection? (Your GP may be able to assist with this)			___ / ___ / ___
If your child is taking medication, please provide details, including whether this can be self-administered:			
Is your child allergic to any medication?	☐ No ☐ Yes	If 'yes' please provide details below:	
Please give details of any special dietary requirements your child has:			
I acknowledge the requirement for my child to behave responsibly and in line with the Heartwood Learning Trust's Behaviour Policy			☐ Yes
☐ I will collect my child at from ☐ I will give my permission for my child to be collected byat from			

I give permission for my child to participate in the above school visit and I have read all the information given. I further consent to my child being given any first aid including urgent medication or surgical treatment which may be considered necessary by the medical authorities during the school visit. I understand that my child is covered by the school/academy's public liability insurance, and that I am able to take out my own additional insurance if I wish. I will inform the school/academy of any change in the circumstances outlined above.

Details of Parent/Carer		Emergency Contact Details	
Signature:		Name:	
Name (in BLOCK capitals):		Telephone Number:	
Date:		Relationship to Pupil:	
Daytime Tel. Number:		Alternative Emergency Contact Details	
Mobile Number:		Name:	
Address:		Telephone Number:	
		Relationship to Pupil:	

Appendix 3 - Financial Planning for Educational Visits and Trips

Financial Planning for Educational Visits and Trips

When planning your school/academy's school trips, the Trust's Accounts department would appreciate as much prior notice as possible in order to process your requests. Please refer to the below checklist for details of information the Accounts department requires along with timescales of when this information must be submitted in order to be processed in a timely manner.

Please note that the person with overall responsibility for ensuring requests are submitted on time will be the **Designated Trip Leader**. Administrative staff are always responsible for contacting parents/carers to arrange payment for school trips.

Where ** is seen below, this refers to tasks which can be delegated to administrative staff, where required.

Educational Visits Overseas	Person Responsible	Deadline for Submitting the Request
☐ Flight booking invoices	Trip Leader**	8 weeks in advance of the trip
☐ Hotel (or other accommodation) booking invoices	Trip Leader	4 weeks in advance of the stay
☐ Requests for Cash Currency	Admin	3 weeks in advance of the trip
☐ ESTA Requests (for US travel only)	Trip Leader	8-12 weeks in advance of the trip
☐ VISA Requests	Trip Leader	8-12 weeks in advance of the trip
☐ Caxton Card Requests	Trip Leader	3 weeks in advance of the trip
Educational Visits (Local)	Person Responsible	Deadline for Submitting the Request
☐ Activities venue invoices	Trip Leader**	2 weeks in advance of the trip
☐ Requests for Cash	Admin	3 weeks in advance of the trip
☐ Tickets for Events	Trip Leader**	3 weeks in advance of booking deadline date
Fairs/Charity Events	Person Responsible	Deadline for Submitting the Request
☐ Requests for Cash	Admin	3 weeks in advance of date of event
☐ Payments to Charities	Admin	2 weeks in advance of payment to be sent
☐ Relevant Invoices	Admin	2 weeks in advance of event
Other Festivities/Off-site Activities	Person Responsible	Deadline for Submitting the Request
☐ Venue Invoices (Deposit)	Trip Leader**	Up to 1 year (please give as much advance notice as possible)
☐ Venue Invoices (Final payments)	Trip Leader**	4 weeks in advance of date
☐ Festivities Invoices	Admin	2 weeks in advance of date

Educational Visits and Trips Checklist

Before undertaking an educational visit or school/academy trip, there are several arrangements that school/academy leaders and the person designated responsible for organising the trip should verify in order to meet health and safety, safeguarding and insurance requirements.

Please use the below checklist as a guide to verify that all appropriate safeguarding, financial and health and safety checks have been carried out prior to any day/evening or residential/international visits school trips taking place.

Please 'tick' each box to confirm that the relevant planning activity has been completed satisfactorily in accordance with the Trust's **Educational Visits and Trips Policy**. Simply work your way through the list and tick where actions have been completed. Please add any 'comments' where applicable, such as further actions required and persons responsible.

Location of Trip / Visit	Risk	Authorised By (prior to formal arrangements being made)
UK Based	Low to Medium Risk	Must be approved, in advance, by the Principal
UK Based	High Risk	Must be submitted with recommendation by the Principal to the Trust Operations Manager (TOM) who will seek approval from the Chief Operating Officer (COO) or Chief Executive Officer (CEO) .
Overseas	ALL	Must be submitted with recommendation by the Principal to the TOM who will seek approval from the COO or CEO .

Arrangements to Check	Done	Comments
Planning and Finance		
An appropriate Educational Visits Coordinator (EVC) , or equivalent, has been appointed and they have received the required training	✓	<i>The Principal should assume this responsibility if there is no EVC</i>
Has the appropriate level of approval been sought and can this be evidenced		<i>No arrangements should be made without the required level of approval</i>
The trip has been arranged in line with the Trust procedures (utilising EVOLVE)		
There are clear links to curriculum areas and activities are beneficial to pupils' social and academic development		

Arrangements to Check	Done	Comments
Information about the trip and possible risk factors has been shared with staff members and parents/carers		
Parental consent for each pupil has been received and permission slips documented		<i>Written parental consent is always required for all trips and visits irrespective of the age of the pupil or the duration and destination of the trip or visit. Consent is obtained on an annual basis at the start of each academic year, and additional consent is sought for individual trips deemed to be high risk (such as international or residential visits).</i>
Final costings have been confirmed and money collected, where necessary		
A record for all financial transactions regarding the trip, including deposits, has been kept up-to-date		
The trip has been funded in line with the Trusts Charges and Remissions Policy		
Risk assessments for the venue, transport and activities have been undertaken		<i>A new risk assessment is not always required for the trip itself. If you have assessed the activity before, reviewing your existing risk assessment is sufficient. Reviewing your current plans or arrangements that were successful for other trips may also be appropriate; however, some trips will require a separate risk assessment, detailed planning and approval from the Principal. You should consider the distance from school/academy, type of activity, location and whether staff with specialist skills are required, to help you decide whether a separate risk assessment is needed. A competent person should conduct the risk assessment, who has the skills, status and competence needed for the job, understands the risks involved, and is familiar with the activity.</i>
[Adventure activities only] The activity has been identified and risk assessed before the trip starts and the abilities of pupils attending has been considered		
[Adventure activities only] It has been checked that the activity provider has a licence		<i>If they have a Learning Outside the Classroom (LOtC) Quality Badge, this will indicate that they have the relevant licence.</i>
[Water sports only] The need for instructors and lifeguards, particularly with regards to hotel swimming pools, has been considered		

Arrangements to Check	Done	Comments
A site visit has been undertaken to check suitability (UK Only)		
It has been verified that the site is accessible to all those attending the trip, including those in wheelchairs		
Transport to and from the venue has been booked in advance using a reliable service provider		
Suitable food and drink has been organised, meeting the requirements of all pupils and staff		
Food and drink supplied is in line with statutory requirements, using a reliable service		
The need for specific provision, such as for those with SEND, has been assessed		
Any necessary provision to meet specific needs has been arranged in line with statutory guidance and the Trust's policies		
Pupils, parents and staff members have been made aware of any particular equipment or clothing that they may need		
Staff code of conduct must be shared to all adult participants. You must clearly state that the consumption of alcohol is strictly prohibited during the trip / visit		
Staffing Arrangements		
It has been ensured that an appropriate staff to pupil ratio is met at all times, taking into account pupils with SEND and any other additional needs		
The need for first aiders has been assessed and an appropriate first aider to pupil ratio is met		
Volunteers can only partake with the advance approval by the Principal and TOM . All volunteers must have a current DBS check and be cleared via the Trusts Recruitment and Selection criteria		
Staff members and volunteers are appropriately trained for undertaking the activities involved		

Arrangements to Check	Done	Comments
Arrangements for covering missed lessons and setting work have been discussed with the Principal and approved		
A member of staff attending the trip has been appointed as the emergency contact		
A senior member of staff who is on the trip has been nominated to coordinate any child protection issues		
Emergency contact arrangements have been checked and necessary phone numbers distributed to staff members and volunteers School/Academy based emergency contact: Principal (unless attending the trip / visit) Trust based emergency contact: TOM and COO <i>*Appropriate contact numbers will be circulated upon request.</i>		
All staff members have been made aware of any particular requirements or needs of those with SEND or medical conditions		
All supervisors have been made aware of their responsibilities		
Health and Safety Measures		
All necessary health and safety, safeguarding and child protection measures have been implemented		
A first aid kit is easily accessible at all times		
The first aid kit has been fully stocked prior to the trip		
The main hazards of the trip have been identified and appropriate control measures put in place to reduce these risks		
Risk assessments have been obtained from the venue		<i>[You should check whether the venue has appropriate safety standards and liability insurance. Check whether the provider holds the LOTC Quality Badge or a similar local accreditation. If the provider does not hold the badge, you should ensure they are an appropriate organisation to use. This could include checking their risk assessments, control measures or staff competence. A full list of the</i>

Arrangements to Check	Done	Comments
		<i>areas to consider checking are outlined in section 3 of the DfE's guidance here.]</i>
Due diligence has been undertaken on the provider or host including the following:- Register at Companies House or equivalent for companies registered overseas Financial review of organisation (obtained via the Chief Finance Officer (CFO)) Safeguarding and insurance profile of organisation (request a declaration from organisation or host) to establish claims and/or proven allegations. Safeguarding procedures and checks in place for organisations and/or hosts		
An agreement has been created between the school/academy and the provider which outlines what everyone is responsible for		<i>[This is especially important if the provider will be taking over the supervision of pupils during the trip.]</i>
A class list and emergency contact numbers have been distributed to each member of staff on the school/academy trip (<i>Inline with the UK GDPR, this must be signed out and in for every trip. Once returned these should be filed or disposed of appropriately. Loss of such records will be defined as a data breach</i>)		
At least one staff member for each group has a charged school/academy phone with them which can be used in the event of an emergency (personal phones should not be used unless a Bring Your Own Device (BYOD) Form has been submitted and approved)		
The weather forecast has been assessed and conditions have been considered		
Supervisors have been informed to conduct frequent head counts at appropriate times, such as when arriving at and leaving areas		
All staff members and volunteers have been made aware of the appropriate reporting procedure to follow in the event of an accident		
The security arrangements of the venue have been verified as appropriate		
Each pupil has been supplied with a school/academy contact card		
Medical Arrangements		

Arrangements to Check	Done	Comments
The EVC , or equivalent, has a record of relevant medical information for all those attending the trip, including staff members		
A sufficient number of supervisors are trained in first aid		
Any potential health hazards associated with the site have been identified and all staff members have been made aware of them		
Appropriate arrangements for those with medical conditions are in place, such as carrying extra snacks for pupils with low blood sugar		
The Trust's Supporting Pupils with Medical Conditions and Administering Medication Policy is followed at all times		
Pupils' parents have given any medication or inhalers to the relevant supervisor and these are clearly labelled with instructions		

Please refer to Localised Educational Visits and Trips Policies for individual school details

Introduction

In line with our Trust-wide **Educational Visits and Trips Policy**, localised procedures have been established to ensure that systems and procedures reflect the school/academy setting.

The localised procedures for the school/academy setting focuses on the following key areas:-

- Local Area Visits
- Safe use of Minibuses
- Minimum Staff to Pupil Ratios
- Dress Codes/Identifiable Items for Pupils on School Trips

Should you have any concerns or questions relating to the localised procedures, in the first instance, please contact hello@hlt.academy